



UNITED STATES PATENT AND TRADEMARK OFFICE

UNITED STATES DEPARTMENT OF COMMERCE
 United States Patent and Trademark Office
 Address: COMMISSIONER FOR PATENTS
 P.O. Box 1450
 Alexandria, Virginia 22313-1450
 www.uspto.gov

BIB DATA SHEET

CONFIRMATION NO. 3301

SERIAL NUMBER 09/930,786	FILING or 371(c) DATE 08/15/2001 RULE	CLASS 705	GROUP ART UNIT 3692	ATTORNEY DOCKET NO. 60021-375602		
APPLICANTS Ronald E. Sloan, Toronto, CANADA; Stephen B. Slutsky, Toronto, CANADA; Yes NN ** CONTINUING DATA ***** This application is a CON of 09/705,287 11/01/2000 ABN and is a CON of 09/431,390 11/01/1999 ABN and is a CON of 09/580,352 05/25/2000 ABN None NN ** FOREIGN APPLICATIONS ***** ** IF REQUIRED, FOREIGN FILING LICENSE GRANTED ** 09/12/2001						
Foreign Priority claimed <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No 35 USC 119(a-d) conditions met <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No Verified and /NGA B NGUYEN/ Acknowledged Examiner's Signature		<input type="checkbox"/> Met after Allowance NN Initials	STATE OR COUNTRY CANADA	SHEETS DRAWINGS 16 17	TOTAL CLAIMS 42	INDEPENDENT CLAIMS 3
ADDRESS Accenture/Finnegan, Henderson, Farabow, Garrett & Dunner, LLP 901 New York Avenue Washington, DC 20001-4413 UNITED STATES						
TITLE Automated financial portfolio coaching and risk management system						
FILING FEE RECEIVED 1236	FEES: Authority has been given in Paper No. _____ to charge/credit DEPOSIT ACCOUNT No. _____ for following:			<input type="checkbox"/> All Fees <input type="checkbox"/> 1.16 Fees (Filing) <input type="checkbox"/> 1.17 Fees (Processing Ext. of time) <input type="checkbox"/> 1.18 Fees (Issue) <input type="checkbox"/> Other _____ <input type="checkbox"/> Credit		